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## Assign Collection by Name (Post-ingest)

- **Product:** Rosetta
  - **Product Version:** v5+
  - **Relevant for Installation Type:** Local
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### Overview

Rosetta collections enable users to aggregate IEs so that they can be preserved according to their original hierarchy. Editors (Typical and Full) and Data Managers (Typical and Full) have access to collections from the Data Management > Collection Management menu.

These authorized users can create, update, and delete collections under the correct circumstances.

Collections include:

- 1+ associated IEs (IEs include the Collection ID)
- A unique path and any optional sub-collections (collection/sub-collection/etc.)
- Metadata in DC format—stored as shared metadata in the permanent repository
- Optional source metadata in any non-DC format (e.g. EAD or MARC)

NOTE: The "Assign Collection by Name" Process can be used scheduled to run on an ongoing basis so that ingested IEs will get added to collections automatically.

### Goal

After completing this how-to you will know how to add IEs to a collection on an ongoing basis.

### Procedure

To create a collection once the IEs have been ingested:

1. Connect to the Management Module and navigate to Data Management > Collection Management.
2. Create the Collection(s):

Click on the "Add Collection" icon in the left pane to create the collection and complete the following mandatory fields and click "Save":

- a. Select parent: Choose "Add first level collection" if this is the first node in the collection hierarchy.
- b. Collection Name: (as it will appear to end-users; e.g. "Photographs")
- c. Collection Description: (internal)
- d. External System: (optional)
- e. External ID: (optional)
- f. Publish: (optional; select if you will publish collection-level metadata for harvesting by a discovery interface (e.g. Primo).
- g. Allow Navigation: (optional; select if you want users to be able to navigate up and down in the collection hierarchy you

are creating).

### 3. Add collection hierarchy nodes to the Collection(s):

To add additional nodes (hierarchy) to the collection you've just created, select it in the left pane, click on the "Add Collection" icon and select the collection name you previously assigned (e.g. Photographs) so that this new node (e.g. "Color") will be created under the previous node; click "Save".

Repeat for any additional nodes in the hierarchy.

### 4. Create a Set from which to build the collection:

Navigate to Data Management > Manage Sets and Processes > Sets, click the "Add Set" button and complete the following mandatory fields and click "Save":

a. Logical (saved query) or Itemized (static) - it's recommended to choose 'logical' if you anticipate ongoing addition to the collection.

b. Set Name: (e.g.) Photographs/Color Collection

c. Description: (optional)

d. Note: (optional)

e. Status: Active

f. Private: No (all staff can see) or Yes (only you can see)

g. Add search conditions to build the set that will be used to create your collection and click "Save" in the bottom right of the page to save your query.

### 5. Create a "Assign Collection by Name" Process to build the collection:

Navigate to Management > Manage Sets and Processes > Processes, click the "Add Process" button, choose the "Assign Collection by Name" process, click "Next" in the lower right of the screen to complete the following mandatory fields

before clicking "Next" and then "Submit" to save:

a. Process Name: (e.g. "Assign Photographs/Color Collection by Name")

b. MID [shared metadata ID]: (e.g. "No Restrictions" collection level access rights)

c. Send email: (No - no email sent to process executor, Yes - email sent when process completes; or On failure only)

d. Choose the set you created in step #4 above

e. Scheduling: you can defer setting an ongoing processing schedule until you've tested this process to confirm it's working as expected.

### 6. Click "Run Now" in the list of processes to (test) run the process you've just created.

7. Once the content has been successfully ingested you can navigate to Data Management > Collection Management and locate your new collection in the left pane.

When you expand the hierarchical Photographs, Color, and Landscapes nodes you should see your IE(s) linked to the 'Landscapes' collection node.

8. NOTE: you can schedule the "Assign Collection by Name" Process to run on an ongoing basis so that objects get added to the collection when this process runs.

NOTE that there may be a lag between the time the content is ingested and when this process runs to add it to the collection.

## Additional Information

Documentation:

[v5.5 Rosetta Staff User's Guide \(chap 41 - "Collections"\)](#)

Refer to the "[Searching the Rosetta Permanent Repository](#)" recorded session to learn how to search Rosetta.

Refer to the [Assign Collection by DC \(Ingest Enrichment Routine\)](#) Article to see how to build collections and add IEs to them during initial ingest.

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